URSUS 2010 State Template Training Tasks Handout

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November 2011

INTRODUCTION

The purpose of this document is for creating and editing content for the 2010 State Template within the URSUS authoring site. It is for beginner users or users that need a refresher in using the 2010 State Template. This document does not include options for the 2007 State Template. Menu items and options are different for the 2007 State Template.

TASKS

1. Create Content Pages
    a. Administration.htm
    b. Info_Mgmt_Audits.htm
2. Add Content Pages to Main Navigation
3. Create Master Page
    a. Training_Master
    b. Create Navigation Panels for Top Tab Nav and Required Footer Links
    c. Navigation Manager
    d. Image Manager
    e. Hyperlink Manager
4. Apply Master Page to Content Pages
5. Create Quick Links Navigation Panel
    a. Use Internal and External Links
6. Update Master Page
    a. Add Quick Links to Navigation A (Block 5)
7. Add Content to Pages
    a. Create Headings
    b. Add Paragraph and Bulleted List
    c. Insert Images
    d. Link to an Internal Page with Custom Links
    e. Insert Code Snippet
    f. Link Document to Text

LOGIN IN

Before accomplishing any of the tasks, login to the URSUS authoring site.
After logging in, go to the “Edit My Site” main tab and select the “Go to My Site” secondary link. This will take you to the authoring site where the authoring panels are available for editing the site.

TASK 1 – CREATE CONTENT PAGES

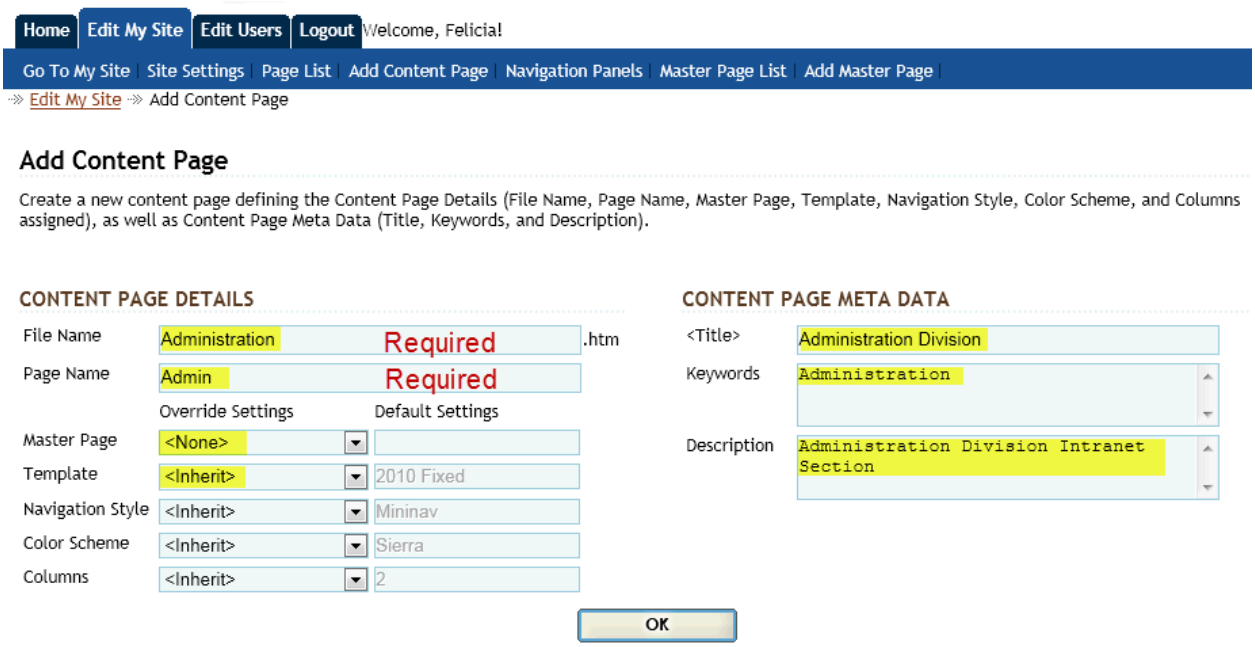
These instructions explain how to create content pages within the URSUS authoring site.

1. From the “Admin” panel, select “Add New Page” or from the “Edit My Site” main navigation, select “Add Content Page”
2. Add the highlighted fields from the image below to the page details
3. Click “OK” button
4. Click “View Page” button to go to the newly created page

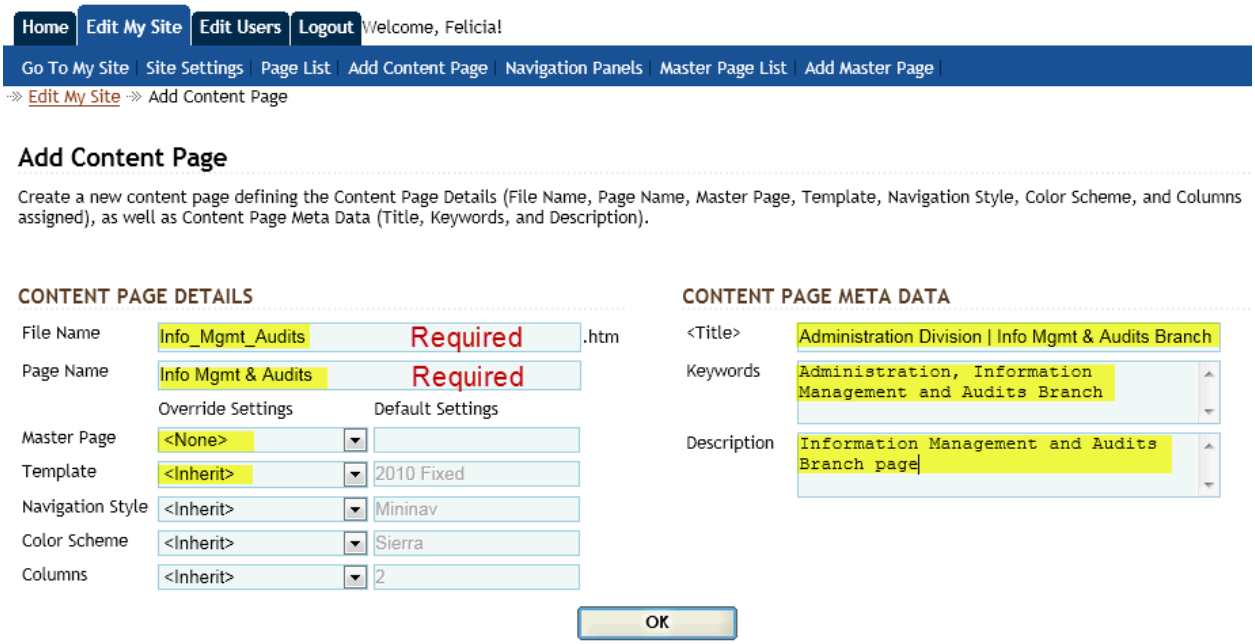
NOTE: The File Name and Page Name are required fields.

- The file name is the name that will appear in the website URL (http://www.xx.gov/filename.htm). It’s recommended to develop a uniform naming convention for the site pages.
- The page name is the name that will appear in the Navigation or Internal Links option

Create Administration Page



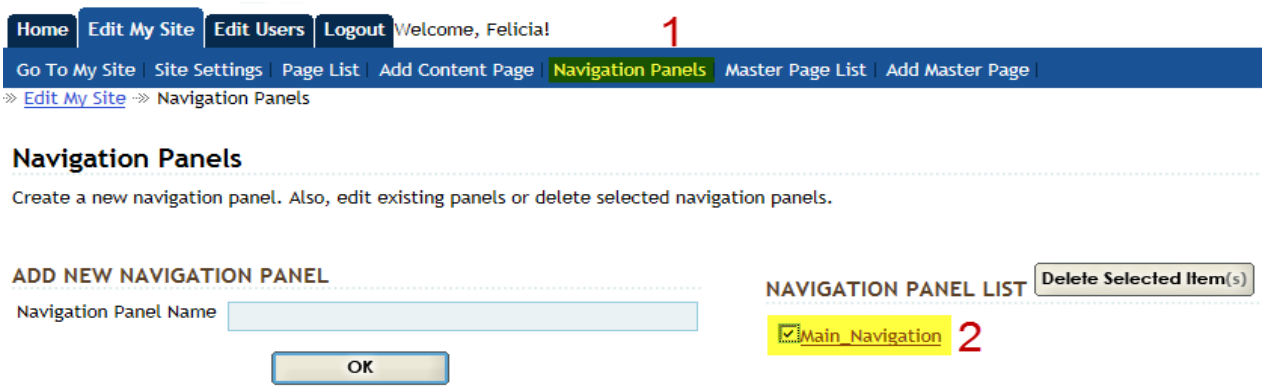
Create Info Mgmt & Audits Page



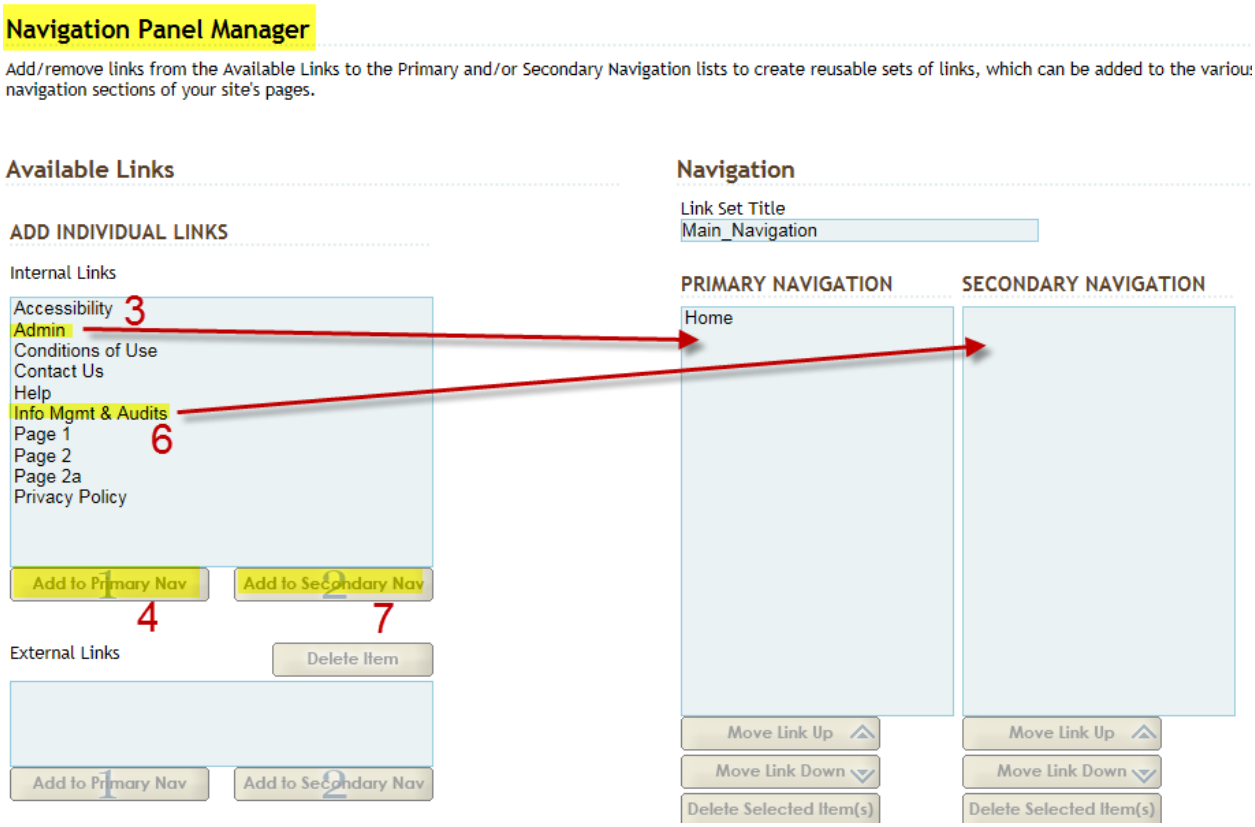
Task 2 – Add Content Pages to Main Navigation

These instructions explain how to add content pages to the main and secondary navigation menu.

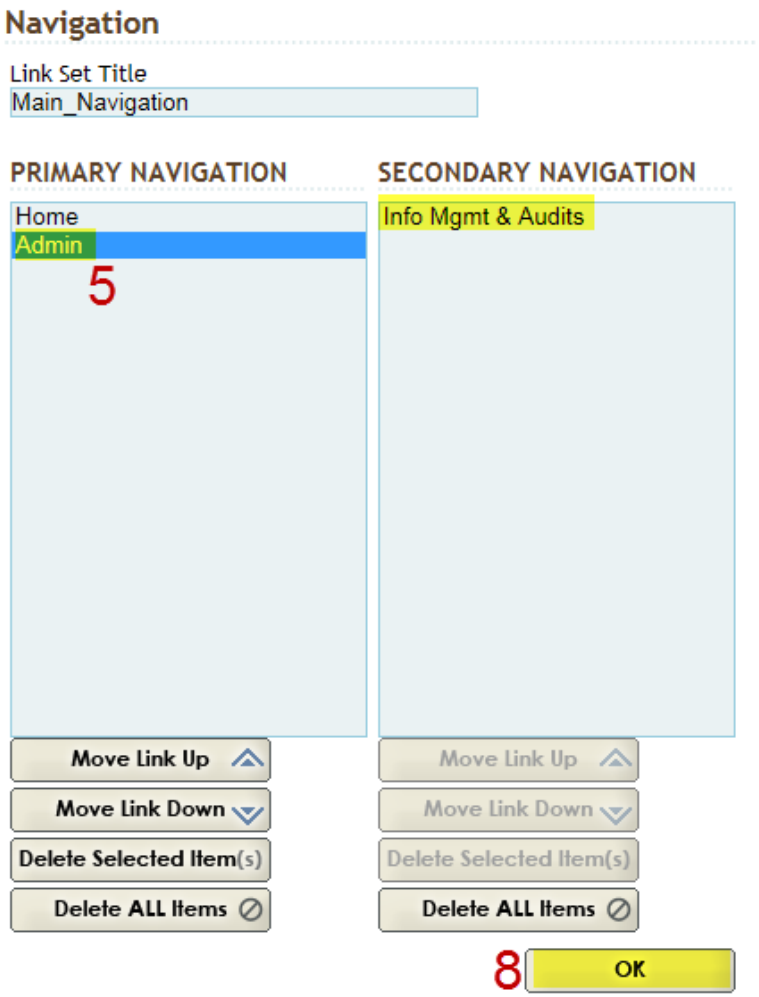
1. From the "Admin" panel, select "Edit Navigation Panels" or from the "Edit My Site" main tab, select "Navigation Panels"
2. Select "Main Navigation" from the "Navigation Panel List" on the right



3. Select "Admin" page from the "Internal Links" list
4. Click "Add to Primary Nav" button

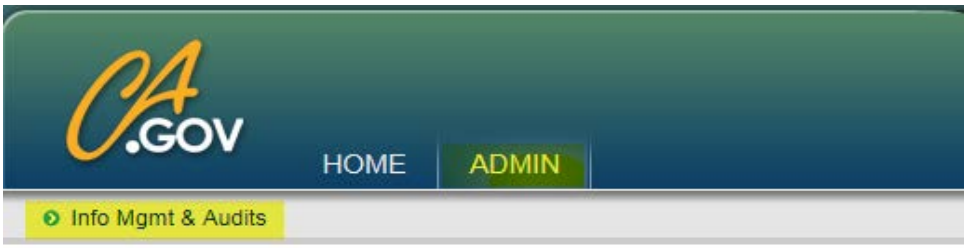


5. Select “Admin” in the “Primary Navigation” list so it’s highlighted
6. Select “Info Mgmt & Audits” page from the “Internal Links” list
7. Click “Add to Secondary Nav” button
8. Click “OK” button



9. Select “Go to My Site” under “Edit My Site” main tab

The Admin page is now shown in the Main navigation and the Info Mgmt & Audits page is shown in the Secondary navigation.



TASK 3 – CREATE MASTER PAGE

These instructions explain how to create a Master Page within the URSUS authoring site. It also explains how to create and apply Navigation Panels using the Navigation Manager, Inserting the agency branding using the Image Manager, and adding content and links in the Content Footer.

From the Admin panel,

1. Select "Master Page List"
2. Select "Add Master Page" under the "Edit My Site" main tab
3. Add the details of the Master Page. Use Interactive Reference Form for Master Blocks. (**Handout #1**)

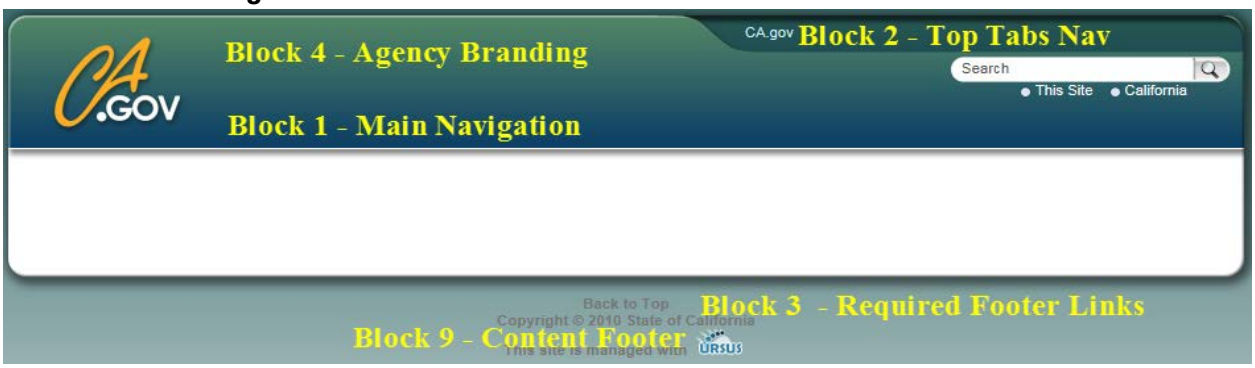
Master Page Details:
Page Name: Training_Master
Template: 2010 Fixed
Navigation Style: Mininav
Color Scheme: Sierra
Columns: 2

Master Blocks:
Content (blue numbers) – Blocks # 4 and 9
Navigation (green numbers) – Blocks # 1, 2, and 3

4. Click "OK" button
5. Select "Master Page List" under the "Edit My Site" main tab
6. Select the Master Page "Training_Master"

The blank master page is created. See image below.

Blank Master Page



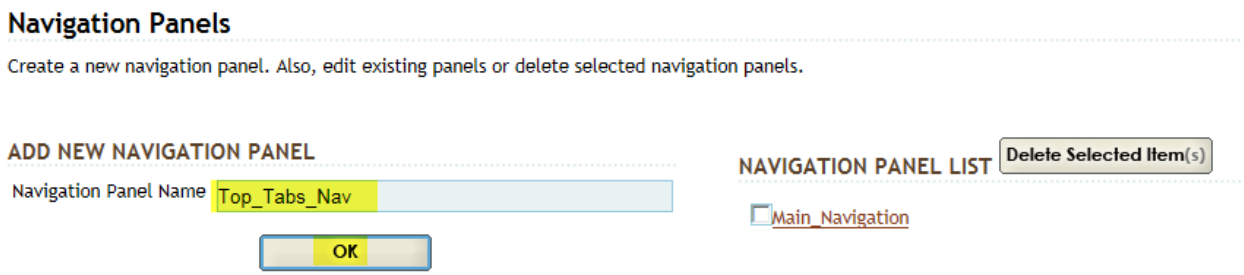
NOTE: All of the required blocks for the Master Page are located under the "Edit Header & Footer" panel. Block #9-Content Footer is optional.

Create the Navigation Panels for the master page and then start adding the other content to the blocks selected on the "Master Page Details" of the "Master Blocks" section. Use the interactive form (**Handout #1**) as a guide.

Create Navigation Panels for Top Tabs Nav and Required Footer Links

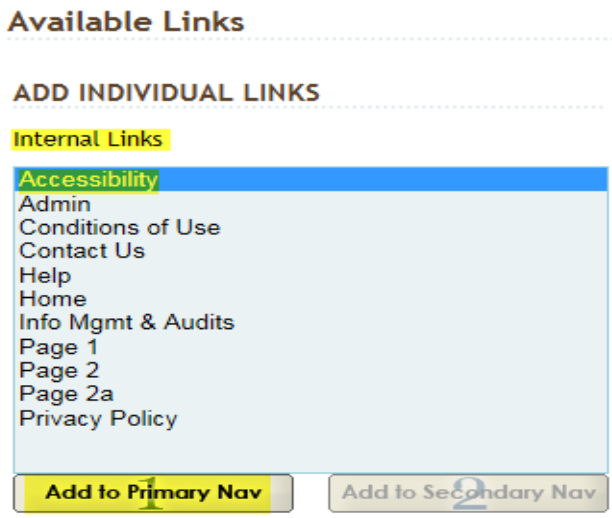
From the Admin Panel,

1. Select "Edit Navigation Panels"
2. In the "Navigation Panel Name" field, type in: **Top_Tabs_Nav**
3. Click "OK" button



4. Click the "Top_Tabs_Nav" panel from the navigation panel List

5. Select the "Accessibility" page from the "Internal Links" list
6. Click "Add to Primary Nav" button
7. Click "OK" button



Repeat the same steps and create a **Required_Footer_Links** navigation panel.
Add these pages to the Required Footer Links:

- Conditions of Use and Privacy Policy

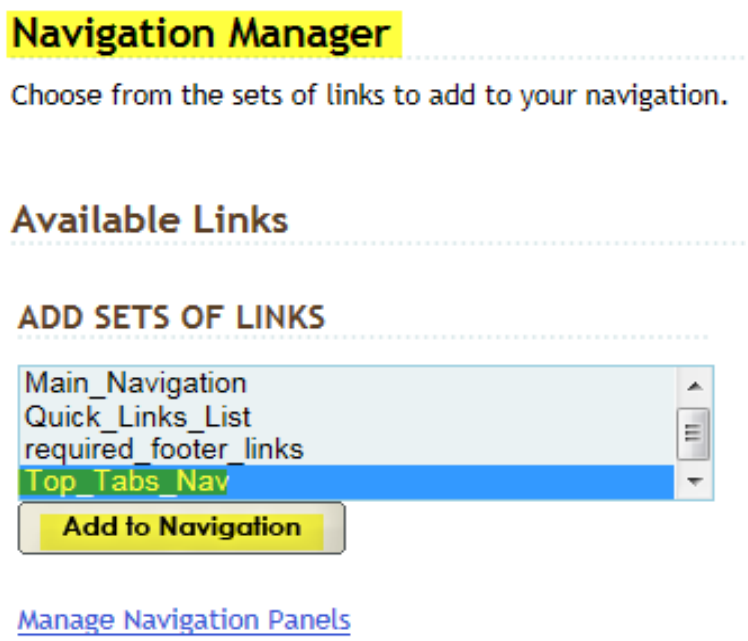
Finish building the Master Page.

1. Select “Master Page List” under the “Edit My Site” main tab
2. Select “Training_Master” from the Master Page List and use the instructions on the following pages to add the content to these blocks:
    - Add Top Tabs Nav Block #2 (Using the Navigation Manager)
    - Add Agency Branding Block #4 (Image Manager)
    - Add Main Navigation Block #1 (Using the Navigation Manager)
    - Add Required Footer Links Block #3 (Using the Navigation Manager)
    - Add Content Footer Block #9 (Content Editor)

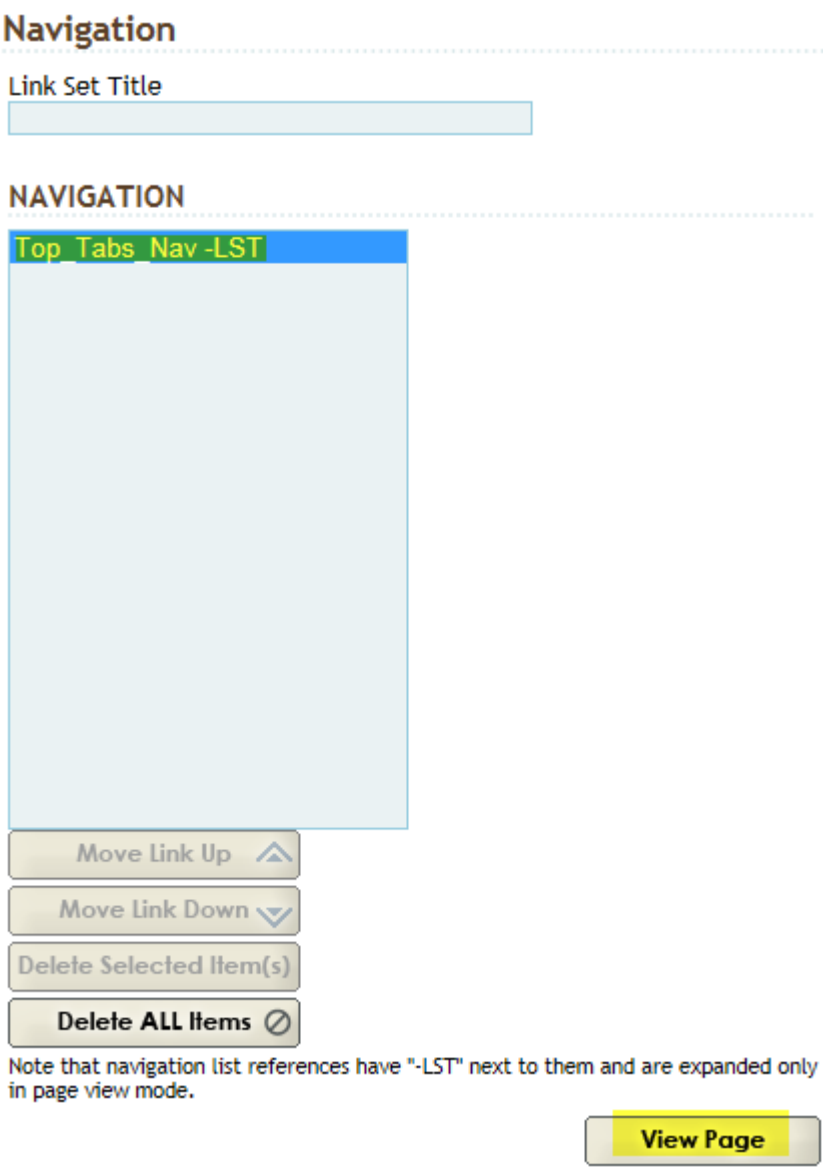
Adding the Top Tabs Nav, Main Navigation, and Required Footer Links

Using the Navigation Manager

1. Select “Top Tabs Nav” from the “Edit Header & Footer” panel
2. Select “Top_Tabs_Nav” under the Add Sets of Links
3. Click “Add to Navigation” button



4. Click “View Page” button



Complete the same steps for the "**Main Navigation"** and "**Required Footer Links"** blocks using the corresponding navigation panels for each section.

NOTE: To delete a set of links in the Navigation Manger:

1. Highlight the list set under navigation
2. Click "Delete All Items" button if there is one set of navigation panel links, but if there are multiple navigation panels listed; click the "Delete Selected Items" button.

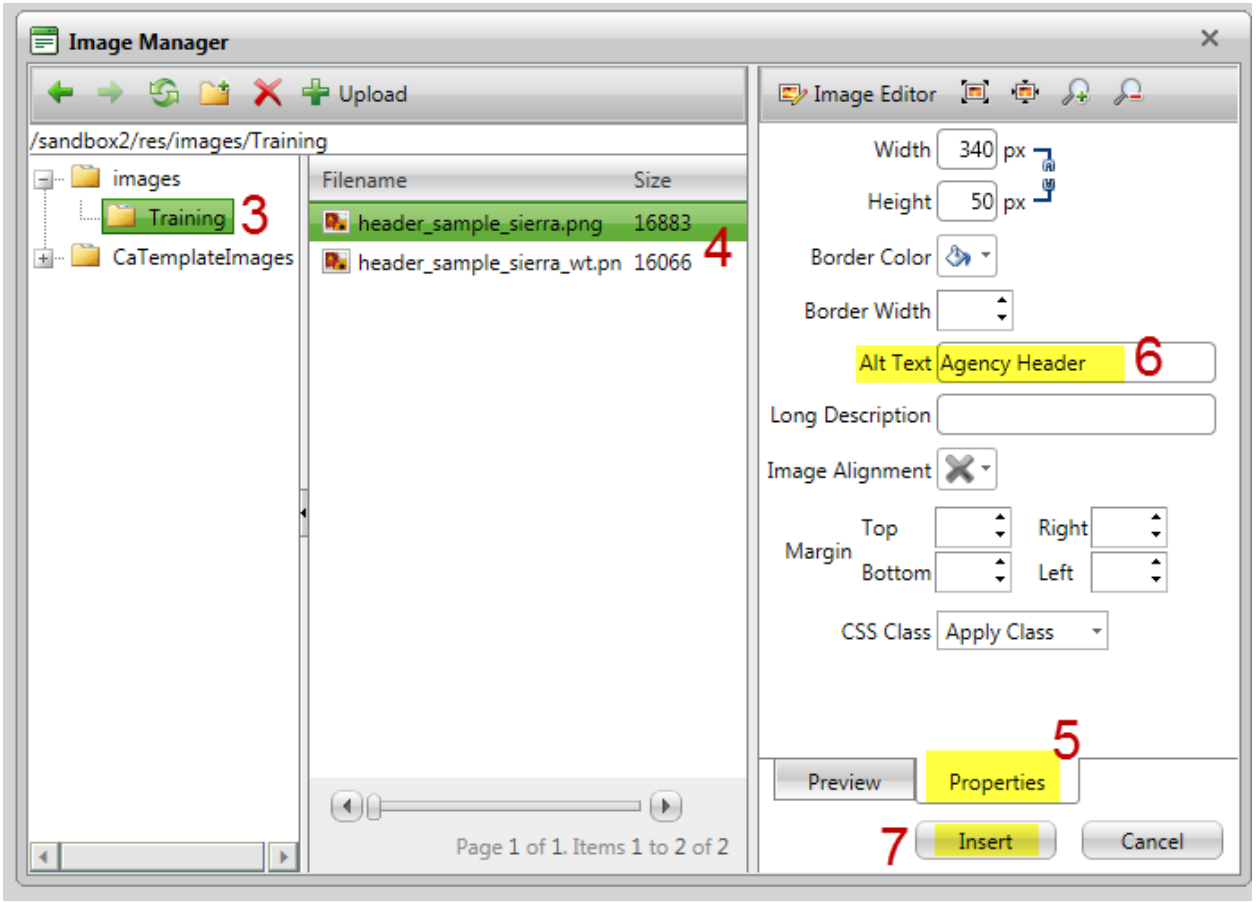
Adding the Agency Branding

The agency branding is usually an image and will be added using the "Image Manager" within the URSUS Content Editor.

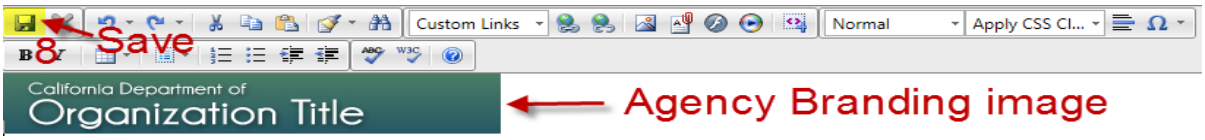
Using the Image Manager

1. Select “Agency Branding” Block #4 from the “Edit Header & Footer” panel
2. Select “Image Manager” icon from the toolbar

3. Navigate to the Training folder which is in the images folder
4. Select the image file: **header_sample_sierra.png**
5. Select “Properties” tab on the right
6. Add the “Alt Text” information in the field
7. Select “Insert” button



8. Select “Save” icon on the toolbar



Add Content Footer

The Content Footer (Block 9) is optional and located within the URSUS Content Editor.

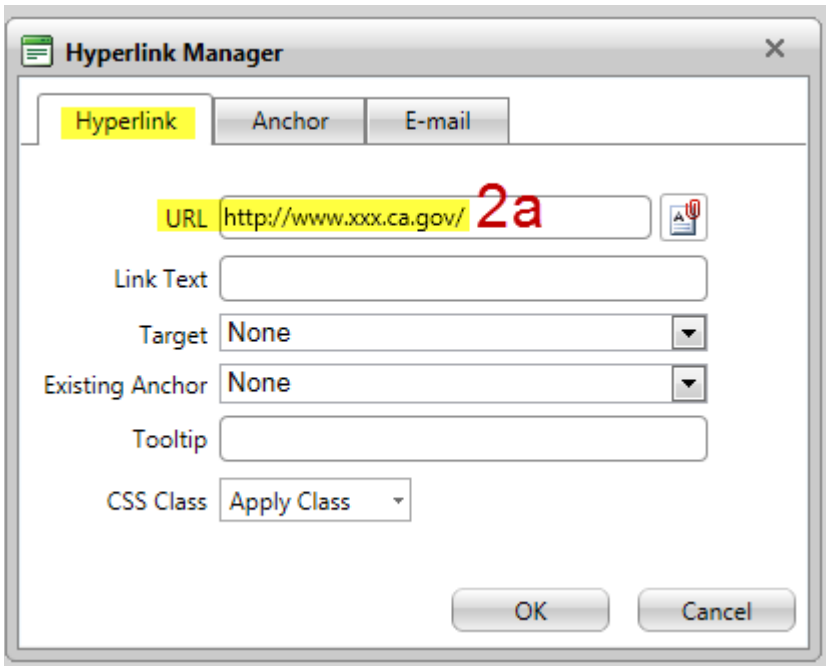
1. Select “Content Footer” Block #9 from the “Edit Header & Footer” panel
2. Type the text for the content footer
3. Use the “Hyperlink Manager” to add a link or email address (see Using the Hyperlink Manager instructions below)
4. Use the “Image Manager” to add an image in the footer
5. Click “Save” icon from the toolbar

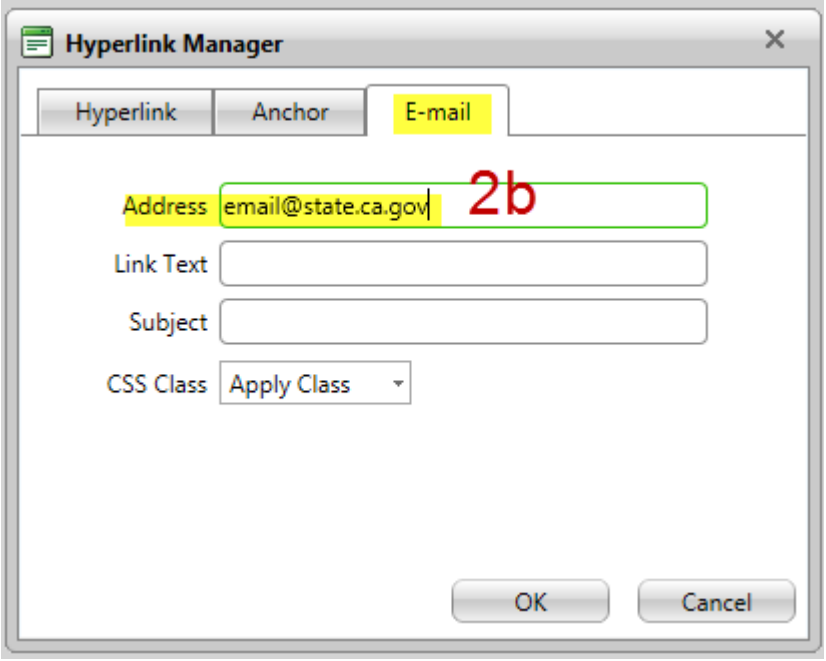
Using the Hyperlink Manager

Create a link to a page, anchor, or email address within your content.

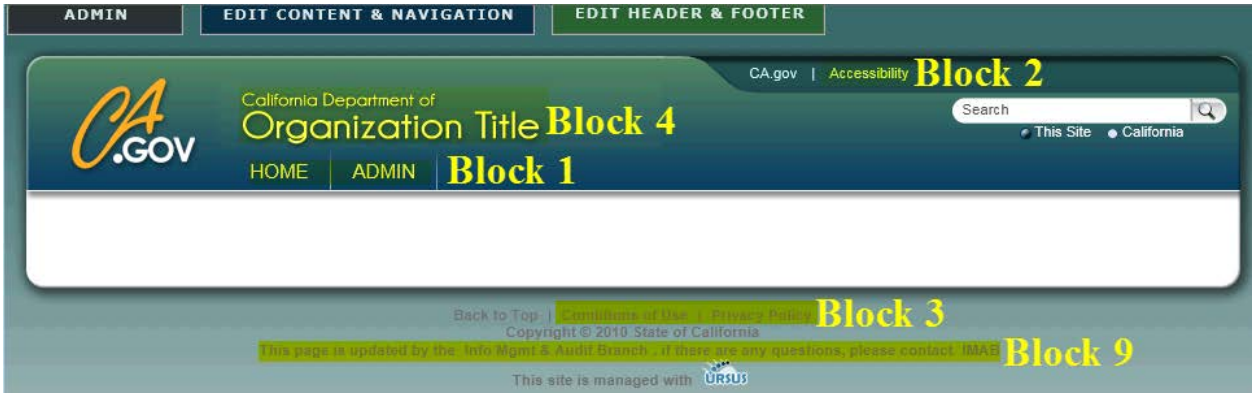
1. Highlight the text that will be linked
2. Select the “Hyperlink Manager” icon from the toolbar
   a. Type in the “URL” for a link on the Hyperlink tab **or**
   b. Type in the email in the “Address” field for an email link on the E-mail tab.
3. Click “OK” button

NOTE: Only one type of link (Email or URL) can be applied to the highlightedtext.





Finished Master Page

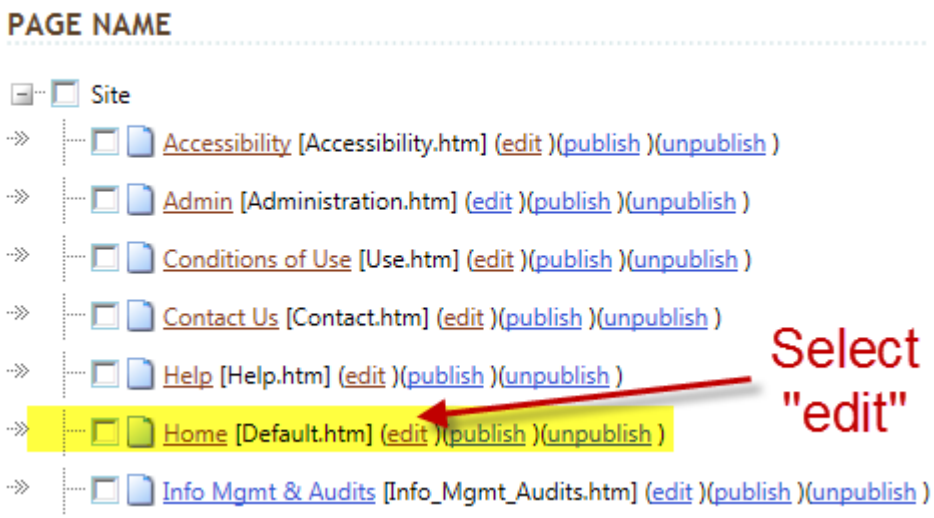


Task 4 – Apply Master Page to Content Pages

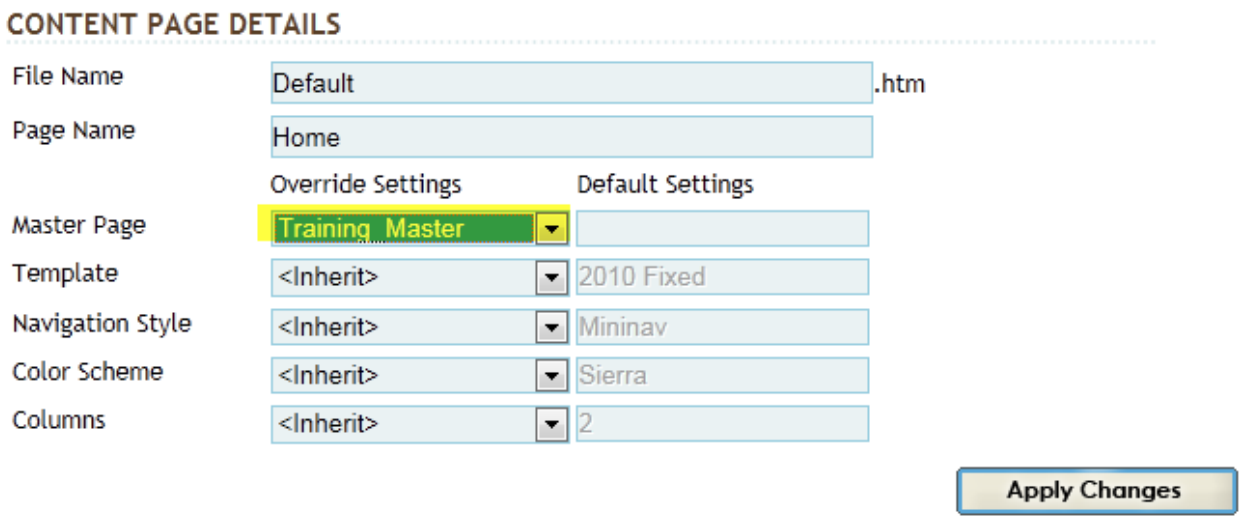
These instructions explain how to apply an existing Master Page to content pages.

From the Admin Panel,

1. Select “Page List” (or “Page Details” from the page itself)
2. Find the “Home” (default.htm) page
3. Select “edit”



4. Select “**Training_Master**”, for the “Master Page” dropdown option



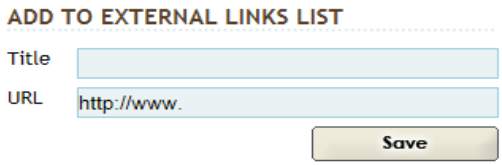
5. Click “Apply Changes” button
6. Click “View Page” button
7. Continue the same steps for the additional pages.

TASK 5 – CREATE QUICK LINKS NAVIGATION PANEL

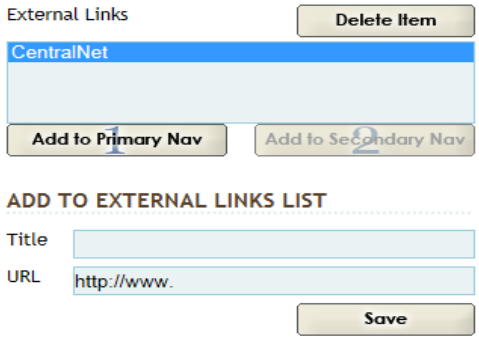
These instructions explain how to create and add a Navigation Panel to the right column of a Master Page.

From the Admin Panel,

1. Select "Edit Navigation Panels"
2. In the "Navigation Panel Name" field, type in: **Quick_Links_List**
3. Click "OK" button
4. Select "Quick_Links_List" from the "Navigation Panel List" on the right
5. Add "Contact Us" and "Help" pages from the "Internal Links" list on the left to the Primary Navigation.
6. Create two External Links



   a. In the "Title" field, type in "CentralNet"
      i. In the "URL" Field, type in: **https://sharepoint.dts.ca.gov/sites/DTS/default.aspx**
      ii. Click "Save" button
      iii. The new link will now show up in the External Links list



   b. In the "Title" field, type in "Ca.gov"
      i. In the "URL" field, type in: **http://www.ca.gov**
      ii. Click "Save" button
      iii. The new link will now show up in the "External Links" list
7. Add the two external links to the Primary Navigation
   a. Select the link in the "External Links" list
   b. Click "Add to Primary Nav" button
8. Click "OK" button after all links are listed in the Primary Navigation list.

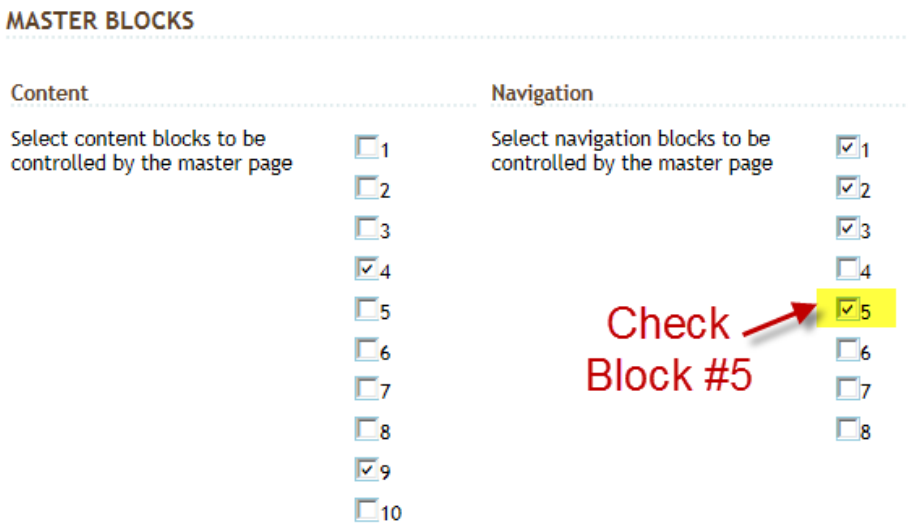
NOTE: To update External Links, the old link must be deleted and a new link added using the steps above.

Task 6 – Update Master Page

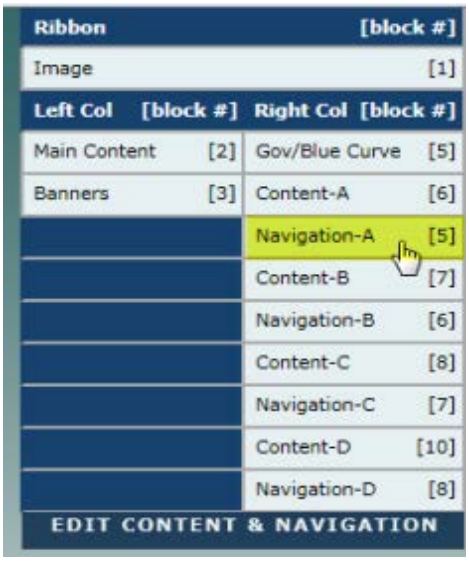
These instructions will explain how to update a Master Page by selecting different block numbers on the Master Page Details.

From the "Edit My Site" main tab,

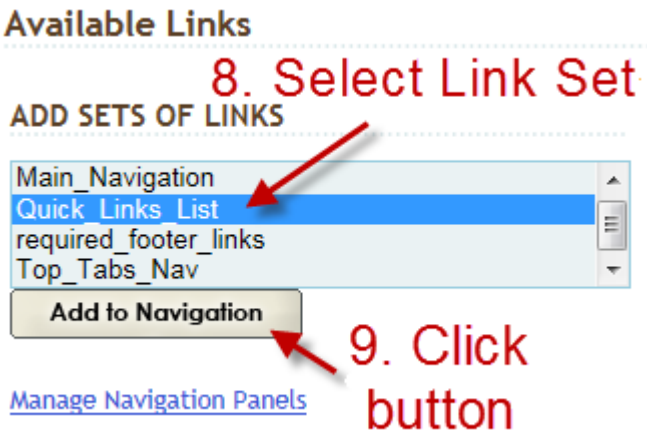
1. Select "Master Page List"
2. Select "Training_Master"
3. From the Admin Panel, select "Master Page Details"
4. Under the Master Blocks section at the bottom, select the checkbox for block 5 under Navigation. Use Interactive Reference Form for Master Blocks. (**Handout #2**)
5. Click "Apply Changes" button
6. Click "View Page" button



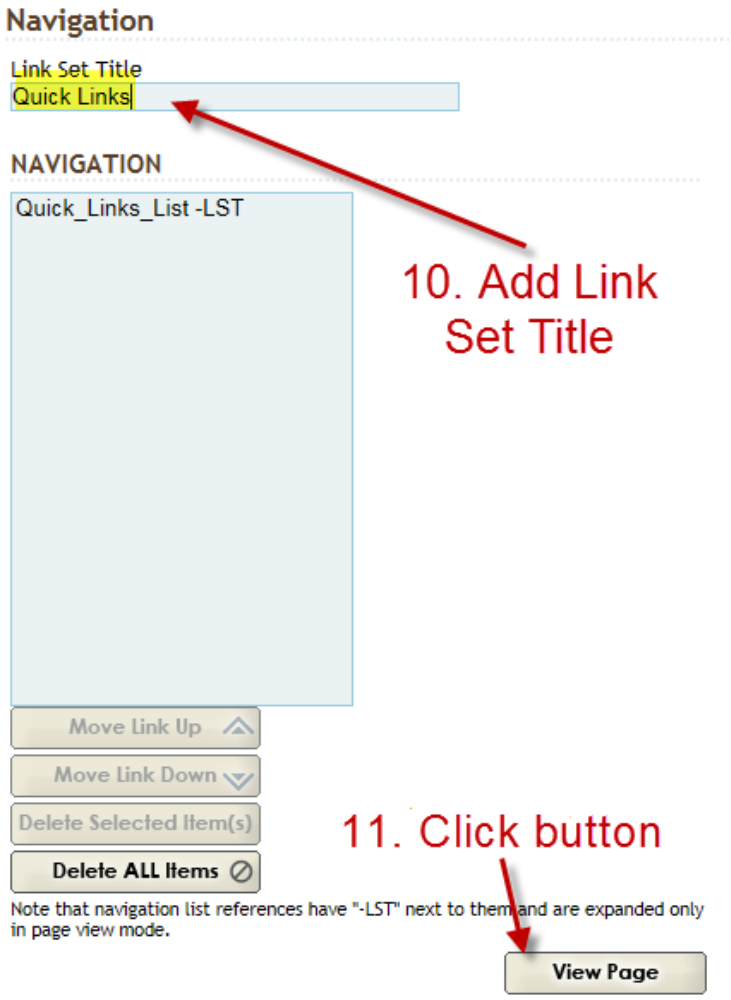
7. From the "Edit Content & Navigation" panel, select "Navigation-A" block #5



8. Select “Quick_Links_List” from the “ADD SETS OF LINKS” list on the left
9. Click “Add to Navigation” button

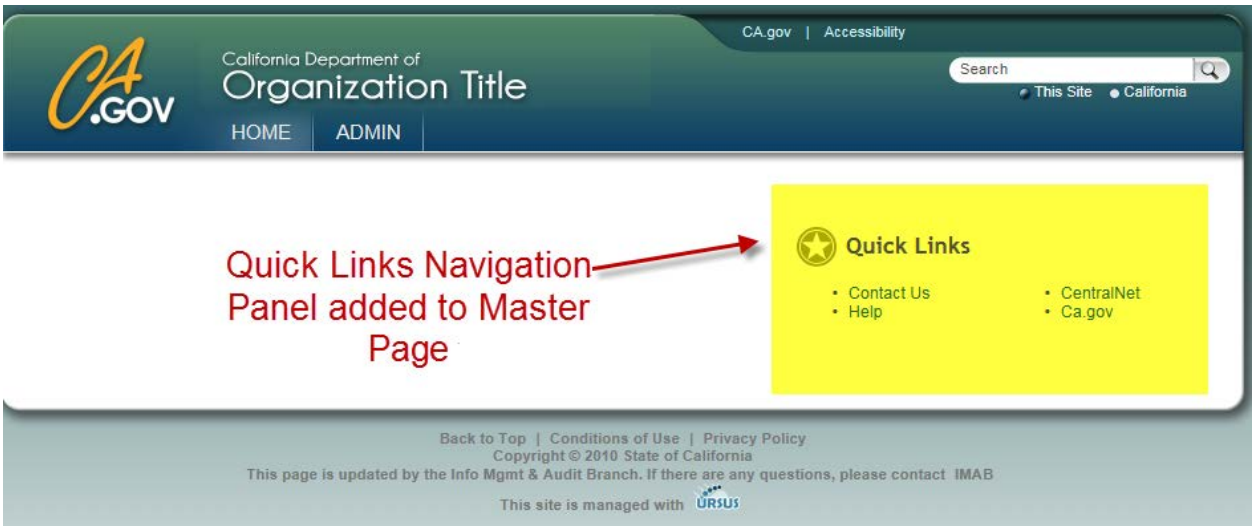


10. In the “Link Set Title” field, type in: **Quick Links**
11. Click “View Page” button at the bottom



Now the Quick Links navigation will show in the right column in block 5 of the Master Page and any page associated with the Master Page.

NOTE: Some browsers may render the right column content differently if there is no main content. The right column may be to the left instead of the right.



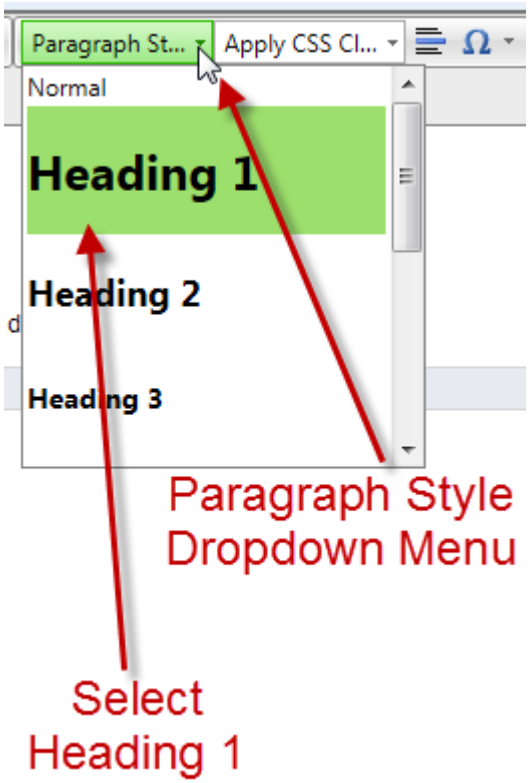
Task 7 – Add Content to Pages

These instructions will explain how to edit the Home page by adding content, hyperlinks, bulleted lists, different styles, images, code snippets, and linked documents.

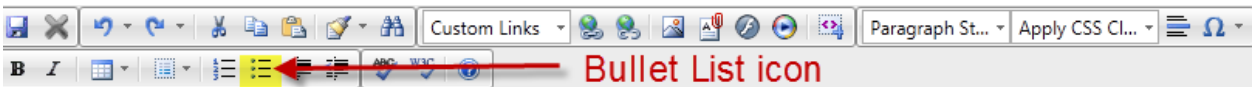
NOTE: The Home page is your default page or it can be accessed from the Page List.

Select "Main Content" Block #2 from the "Edit Content & Navigation" panel

1. Add a Header title to the main content
    a. Type: **Welcome**
    b. Highlight the word **Welcome**
    c. From the "Paragraph Style" dropdown menu on the toolbar, select "Heading 1"



2. Type a secondary heading applying the **Heading 2** style
3. Write a paragraph under the secondary heading
4. Type another heading and apply the **Heading 3** style
5. Create a bulleted list using the "Bullet List" icon from the toolbar



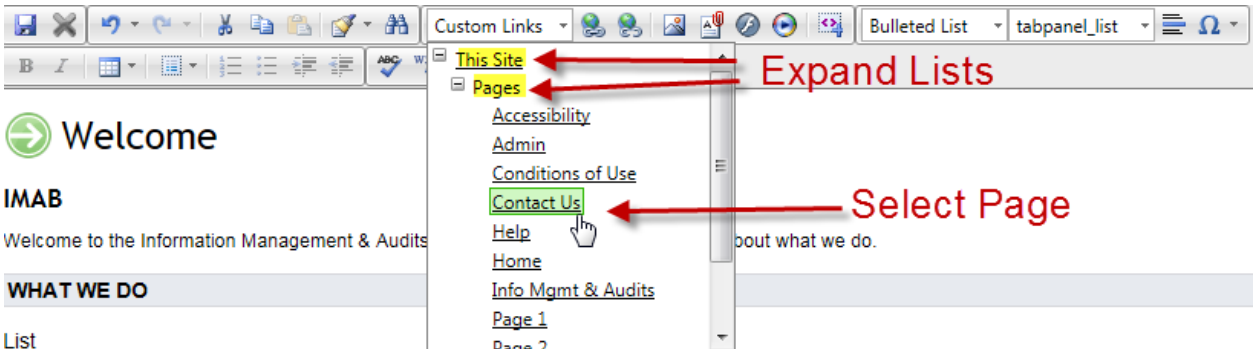
6. Insert an image using the "Image Manager"

7. Insert a link to an Internal Page

Using Custom Links

a. Type: **Contact Us** on a new line
b. Highlight the text "Contact Us"
c. Select the "Custom Links" dropdown menu from the toolbar

d. Click the plus "+" sign by **This Site** to expand
e. Click the plus "+" sign by **Pages** to expand
f. Select the "Contact Us" page

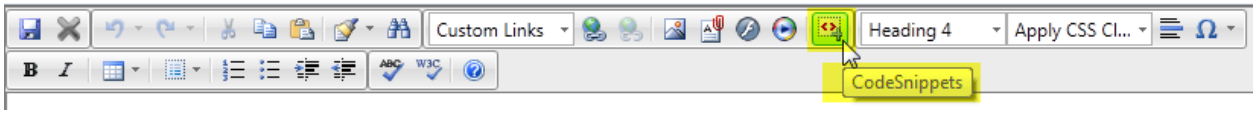


8. Insert the "Tab Panel" using the "Code Snippets" icon from the toolbar

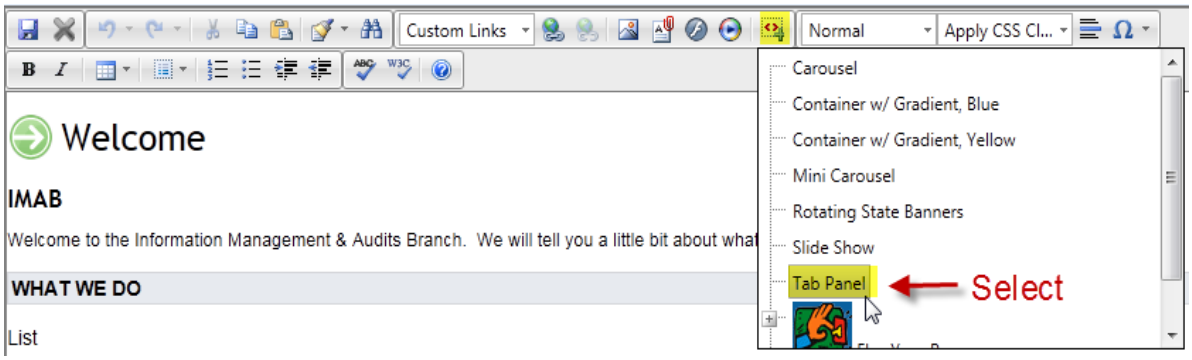
Using Code Snippets

NOTE: Code snippets are a foundation to build from. Some HTML coding is needed.

a. Place the cursor where you want the Tab Panel to appear on the page
b. Select the "CodeSnippets" icon from the toolbar



c. Select the "Tab Panel" code snippet from the dropdown menu



9. Link a document to one of the bulleted list items from step #5 using the "Document Manager"

Using the Document Manager

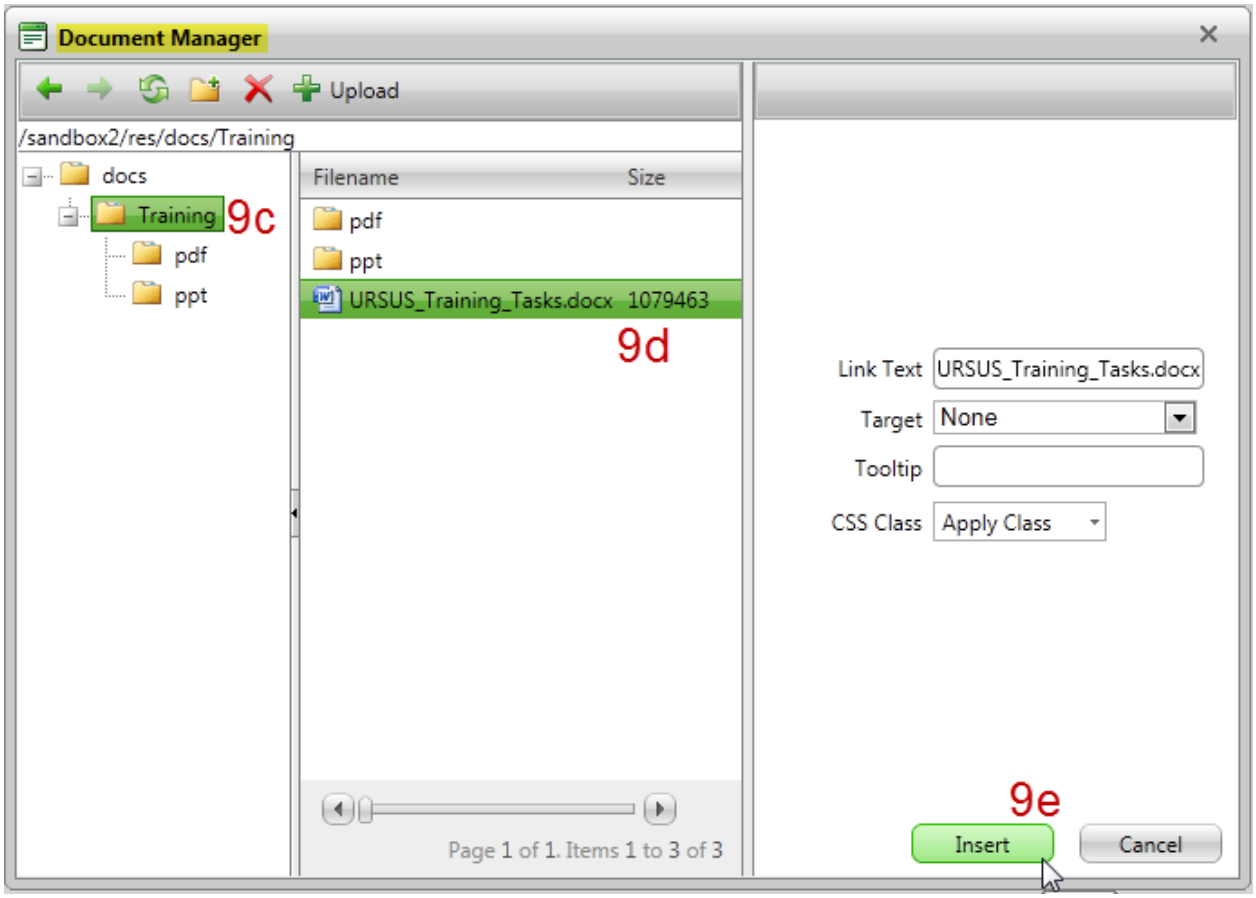
a. Select the text to link

b. Select the "Document Manager" icon from the toolbar

c. Navigate to the Training folder which is in the docs folder

d. Select the document file: **URSUS_Training_Tasks**

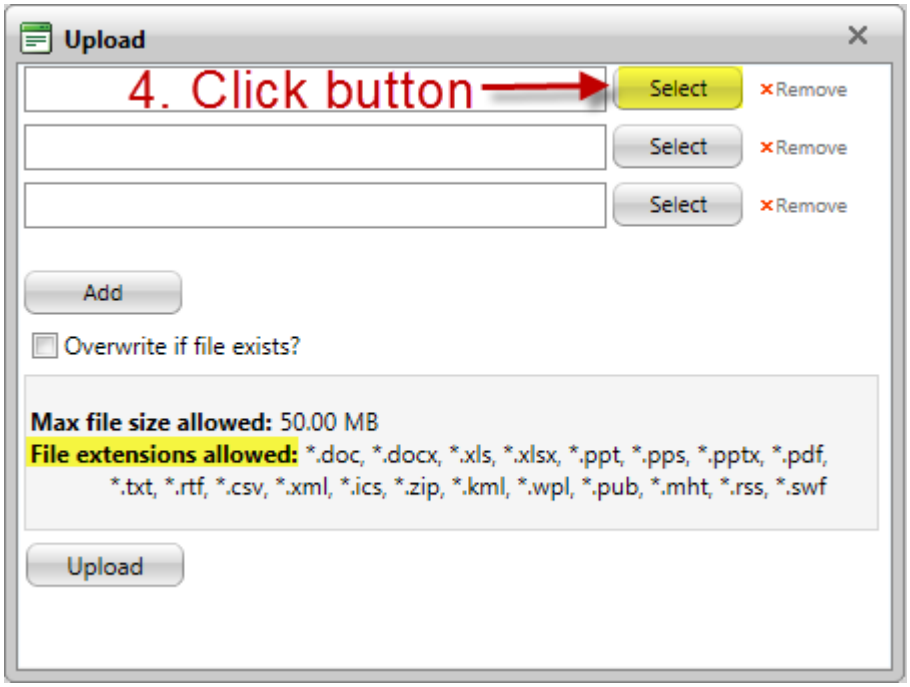
e. Select the "Insert" button



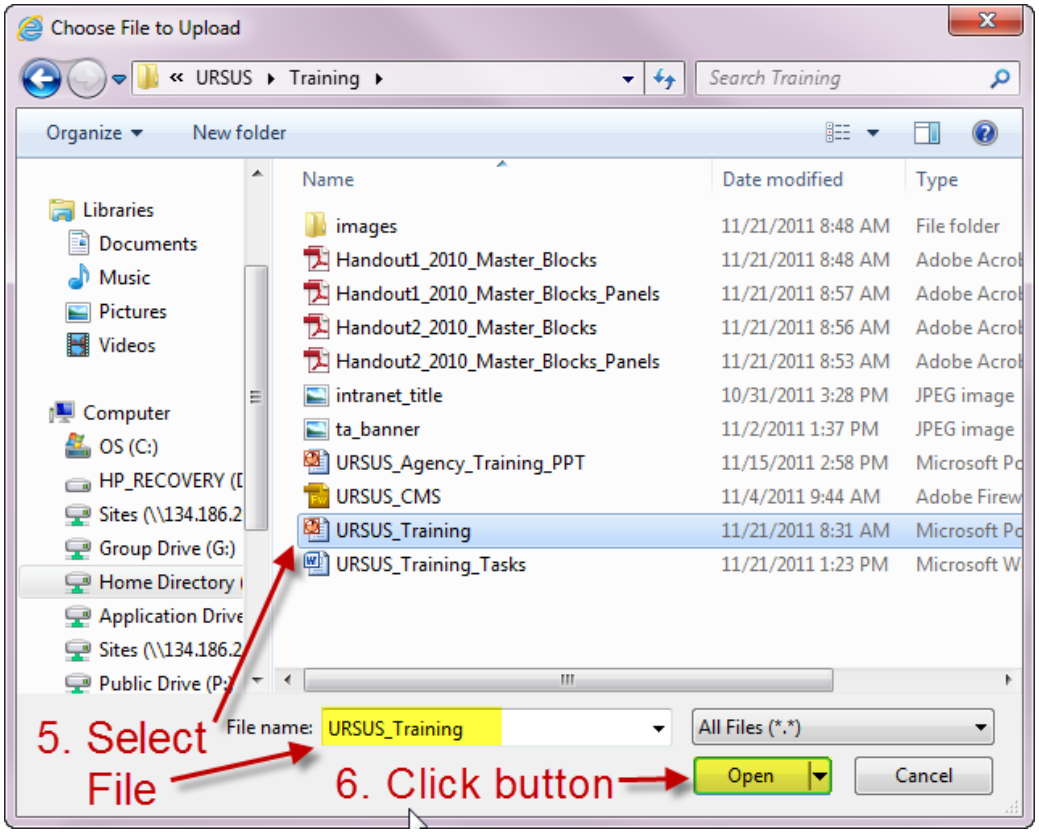
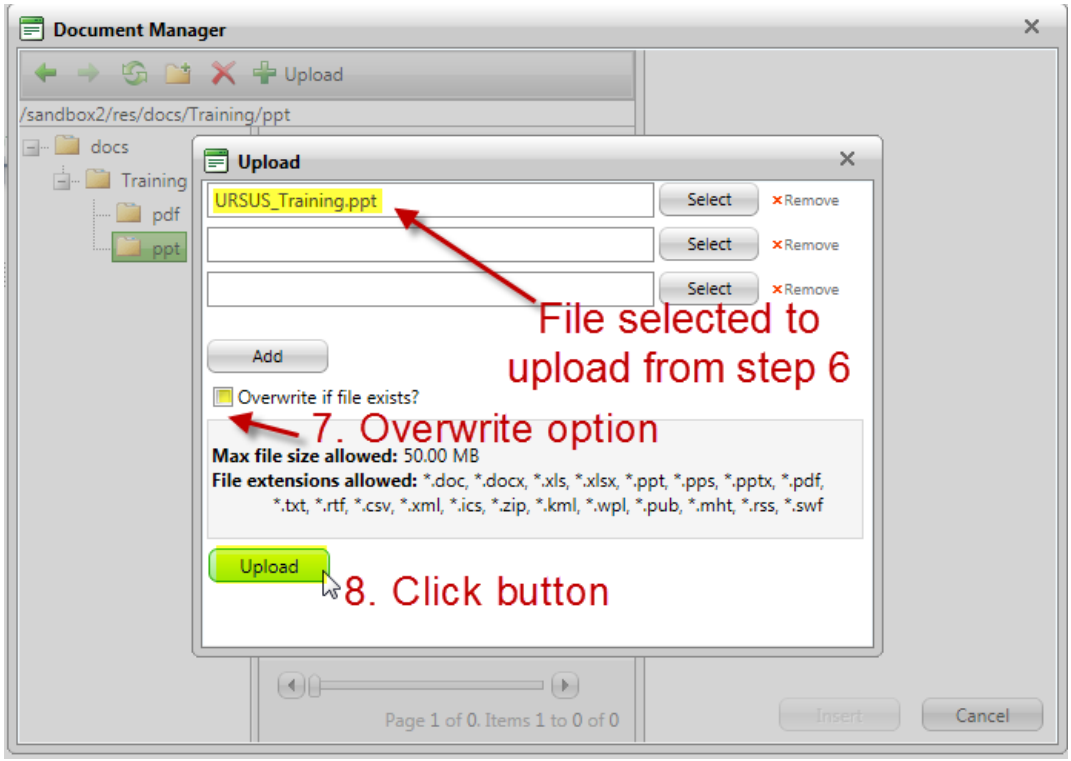
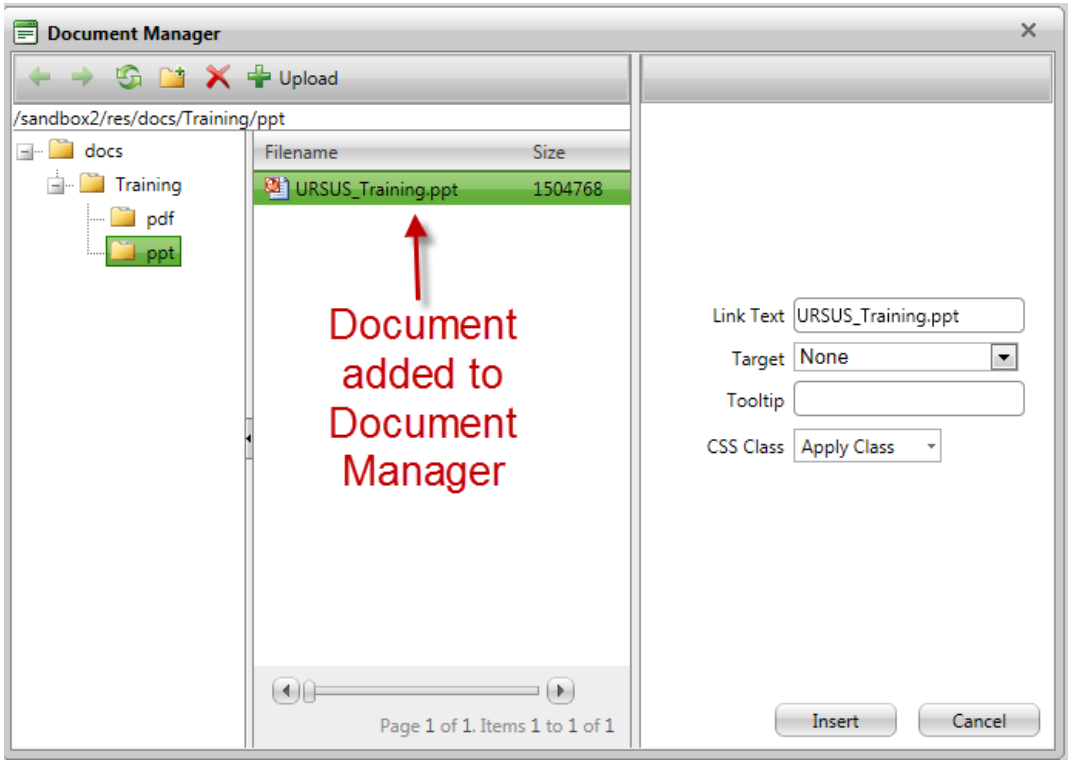
Upload a Document Using the Document Manager,

1. Select the "Document Manager" icon from the toolbar
2. Navigate to the folder where the document will be uploaded
3. Select the "Upload" button on the menu bar

4. Click the “Select” button



5. Navigate to the document that will be uploaded and select the file
6. Click the “Open” button



7. Check the “Overwrite if file exists?” checkbox if the file already exists and needs to be updated
8. Click the “Upload” button